MANUFACTURING TALENT LANDSCAPE INDIA

2025–26

Talent Architecture · Competition Mapping · Compensation · Workforce Behaviour

April 2026 | Consulting Report | India Manufacturing Talent Intelligence

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EXECUTIVE SUMMARY

Industry Scale	**~50M workforce**	10-12% of total jobs; organized segment 20M+ growing at 6% YoY; PLI added 1.4M incremental roles
Fastest Growth	**Electronics: 15%+ employment growth**	vs. overall 6%; FMCG/Food 12.6% CAGR to $535B; Auto 19.44% CAGR to 2029
Talent Gaps	**320K–350K semi shortfall**	VLSI engineers: 50% gap in Bengaluru; Automotive embedded: 38-43% critical shortage in Pune/Chennai
Compensation Hikes	**9–9.5% mfg/auto hike (2025–26)**	Electronics skill premiums +30-40%; City premium: metros 30-40% above national average; Tier-2 at 82% parity
Attrition Pressure	**12–14% overall mfg attrition**	Down from 16.2%; Production roles highest at 18-20%; Electronics Bengaluru critical at 25%
Job Switch Intent	**40–45% open to change**	15-20% actively looking; 0-2 yrs highest at 20-22% attrition; Tier-2 lowest intent (12-17%)
Competition Intensity	**Top 10 control 20-25% organized talent**	Pune, Chennai, NCR have 3+ large employers; Electronics GCCs (Qualcomm, Nvidia) elevate R&D benchmarks

SECTION 01

INDUSTRY OVERVIEW

INDUSTRY GROWTH | Overview

Peepal — 20 YEARS OF TRUST

15-17%
GDP Contribution
Q1 FY26 GVA anchored

₹7.61T
Quarterly GVA (Q1 FY26)
Annual ~₹30T est.

4.3–9.1%
Output Growth YoY
Mar26 4.3% | Q2 FY26 9.13%

~20M+
Organized Workforce
+6% YoY | PLI: 1.4M

SUB-INDUSTRY GROWTH BREAKDOWN

Sub-Industry	Market Size	Growth Rate	Employment	Emp. Growth
Automotive & EV	~28M vehicles prod.	19.44% CAGR (2029)	4–5M (est.)	6–10%
Electronics & Semiconductor	$45–50B (2025)	20%+ (→ $110B 2030)	~2M (PLI)	15%+
Industrial Machinery	12% mfg GVA	NA	1.4M direct	6%
Chemicals & Specialty	$220B total	9%	~2M	9%
FMCG & Food Processing	$535B by 2025–26	12.6% CAGR	7–8M (FPI)	10%
Pharma & Life Sciences	~$50B (2025 est.)	10–12%	~3M	8%

[1] India Briefing 2025-26 [2] Economic Survey 2025-26 [3] PIB PLI [4] EY Chemicals [5] ET Food Processing

TALENT POOL SIZE | Overview

Peepal
20 YEARS OF TRUST

~50M
Total Mfg Workforce
10-12% of 56Cr total jobs

20M+
Organized Workforce
40% of manufacturing

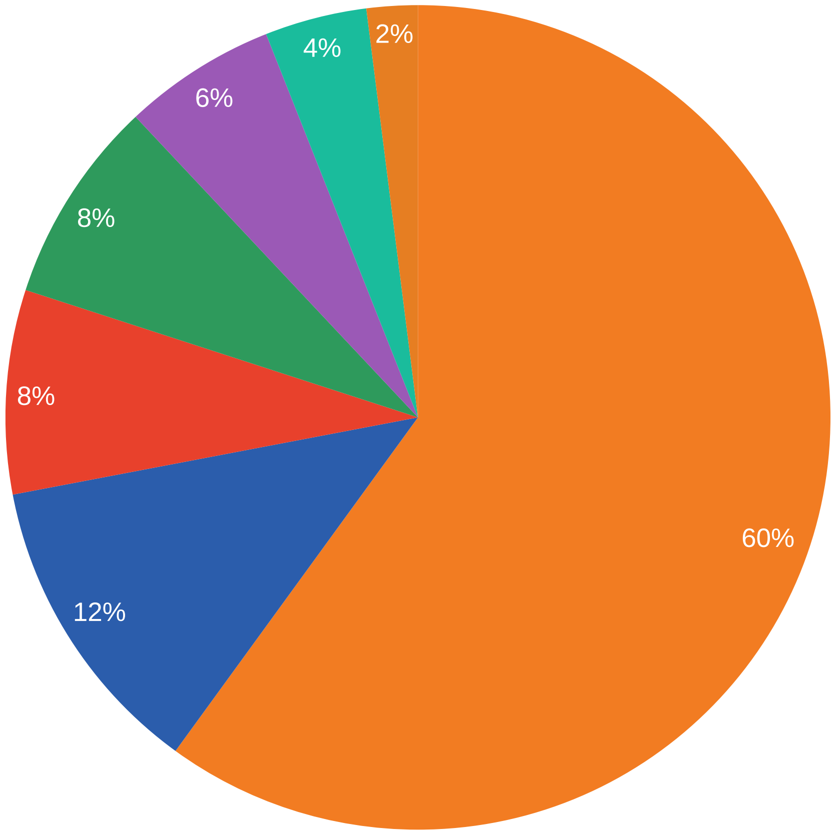
~30M
Unorganized Workforce
60% of manufacturing

TALENT SPLIT BY SUB-INDUSTRY

Sub-Industry	Headcount	% Share	Dominant Roles
Automotive & EV	5M	10%	Assembly, EV Engineering
FMCG & Food Processing	8M	16%	Process Operations
Pharma & Life Sciences	3M	6%	Formulators, R&D
Electronics & Semiconductor	2M	4%	Fab Technicians
Chemicals & Specialty	2M	4%	Chemical Operations
Industrial Machinery	1.4M	3%	Machinists
Others / Unallocated	~28.6M	57%	Unorganized / Informal

[1] Economic Survey 2025-26 [2] Data for India [3] Sub-sector proxies Note: Others/Unallocated = 57% reflects unorganized informal sector

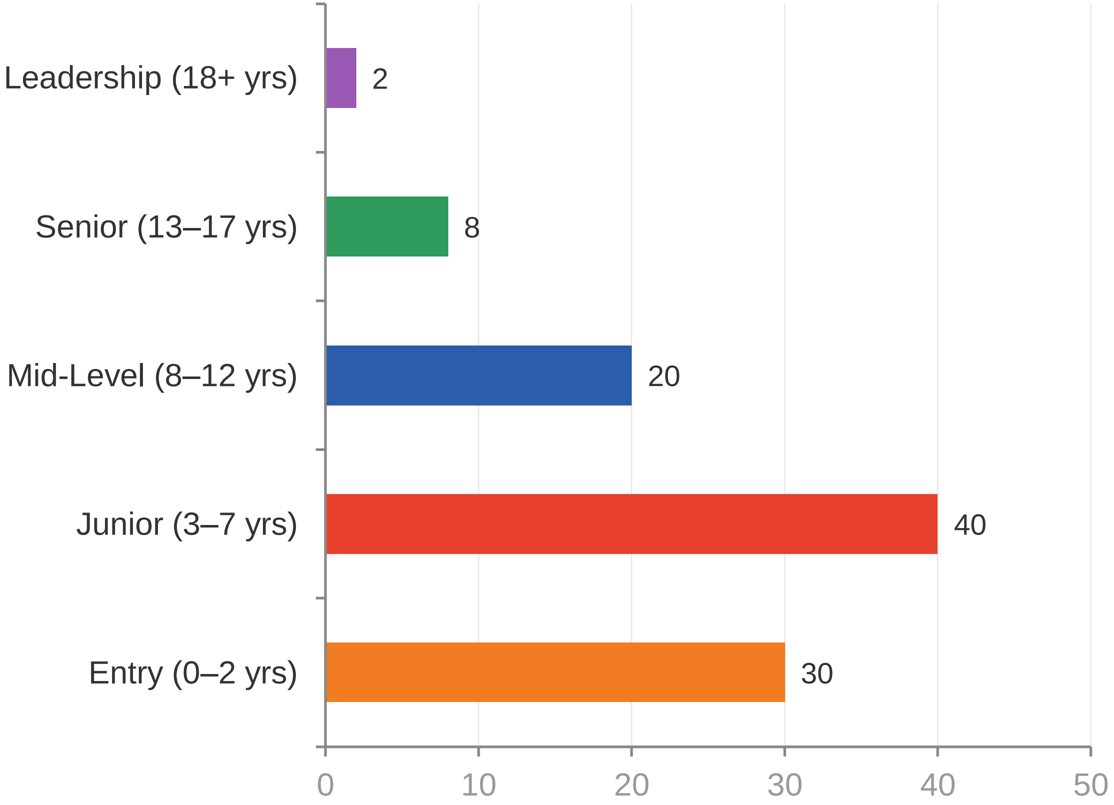
WORKSTREAM DISTRIBUTION | Overview



Workstream	Headcount	% Share
Production / Operations	**30M**	**60%**
Engineering (Design, R&D, Process)	**6M**	**12%**
Quality & Compliance	**4M**	**8%**
Supply Chain & Procurement	**4M**	**8%**
Maintenance & Plant Operations	**3M**	**6%**
Sales (B2B / Industrial)	**2M**	**4%**
Corporate Functions (HR, Finance, IT)	**1M**	**2%**

Source: Estimated from sector proxies, PLI data, PLFS; no direct 2025 aggregate available

SENIORITY MIX | Overview



KEY INSIGHTS

- Junior (3–7 yrs) dominates at 40% (20M) — scale-up skew
- Entry level 30% (15M) — fresher hiring surge driven by PLI
- Mid-level only 20% — structural gap in experienced talent
- Senior + Leadership combined just 10% (5M) — leadership scarcity
- Electronics growing 15%+ vs 6% avg — entry skew amplifying

Source: Estimated from PLFS, PLI data, fresher hiring surge reports. Seniority mix = estimation from subsector proxies.

SECTION 02

COMPETITION MAPPING

AUTOMOTIVE & EV MANUFACTURING | Competition Mapping

Peepal
20 YEARS OF TRUST

~120K	~20-25% of 5M	Pune, Chennai, NCR	~12K
Top Players HC	Subsector Share	High-Comp Cities	Avg HC/Company

Company	Mfg HC	Metro Cities	# Locations	Key Functions	Hiring
Maruti Suzuki	15K+	Gurgaon, Manesar	5+	Production/Ops, Supply Chain	High
Tata Motors	35K	Pune, Mumbai	10+	Engineering/R&D, Production	High
Hyundai India	10K	Chennai	3	Production, Quality	High
Mahindra	15K	Pune, Mumbai	6	Engineering/R&D, Maintenance	Medium
Ola Electric	5K	Chennai	2	Production, Engineering	High
Bajaj Auto	8K	Pune	4	Production, Supply Chain	Medium
TVS Motor	10K	Bengaluru	5	Production, Quality	Medium
Hero MotoCorp	7K	NCR	4	Production, Engineering	Medium
Ashok Leyland	12K	Chennai	3	Production, Maintenance	Medium

KEY INSIGHTS:

- Pune/Chennai 60% of top player presence
- Top 10 ~25% subsector talent (120K/5M)
- EV shift elevates Engineering hiring at Tata, Ola, Mahindra
- Maruti/Hyundai combined 50K — scale production leaders

ELECTRONICS & SEMICONDUCTOR MFG | Competition Mapping

Peepal
20 YEARS OF TRUST

~115K	~5-10% of 2M	Bengaluru, Chennai, Noida, Hyderabad	~11.5K
Top Players HC	Subsector Share	High-Comp Cities	Avg HC/Company

Company	Mfg HC	Metro Cities	# Locations	Key Functions	Hiring
Foxconn	40K+	Chennai	3	Production, Maintenance	High
Samsung	20K	Noida, Chennai	4	Production, Engineering	High
Dixon Tech	15K	Noida	2	Production, Quality	High
HCLTech	2.9K (semi)	Noida, Bengaluru	7	Engineering/R&D, Quality	Medium
Qualcomm	5K+	Bengaluru, Hyderabad	6	Engineering/R&D, Design	High
Nvidia	3.8K	Bengaluru, Pune	4	Engineering/R&D	High
NXP	2.5K	Bengaluru, Noida	4	Engineering, Quality	Medium
Tata Elxsi	10K (eng)	Bengaluru	3	Semi Design, R&D	High
Wistron	10K	Bengaluru	2	Production, Supply Chain	Medium

KEY INSIGHTS:

- Bengaluru/Chennai/Noida dominate 80% presence
- Engineering/R&D focus in GCCs (Qualcomm, Nvidia >3K each)
- Chennai = scale hub for assembly (Foxconn, Samsung)
- Top 10 ~115K = 6% subsector share amid PLI ramp

INDUSTRIAL MACHINERY & CAPITAL GOODS | Competition Mapping

Peepal
20 YEARS OF TRUST

~140K	~10% of 1.4M	Pune, Mumbai, Bengaluru, Chennai	~17.5K
Top Players HC	Subsector Share	High-Comp Cities	Avg HC/Company

Company	Mfg HC	Metro Cities	# Locations	Key Functions	Hiring
Larsen & Toubro	50K+ (mfg)	Mumbai, Chennai	50+	Engineering, Production	High
BHEL	30K	Delhi, Bhopal	15	Engineering, Maintenance	Medium
Hindustan Aeronautics	20K	Bengaluru	5	Precision Mfg, R&D	Medium
Siemens India	10K	Mumbai, Bengaluru	10	Engineering, R&D	Medium
Cummins India	10K	Pune	5	Engineering, Maintenance	Medium
ABB India	8K	Bengaluru, Vadodara	8	Engineering, Quality	Medium
Kirloskar	7K	Pune	6	Machining, Production	Medium
Thermax	5K	Pune	4	Engineering, Production	Medium

KEY INSIGHTS:

- Pune hosts 40% of machinery talent concentration
- L&T dominates with 35%+ of top player headcount share
- Engineering/Plant Ops dominant in 80% of firms
- L&T 50K alone exceeds total of next 7 firms combined

CHEMICALS & SPECIALTY MATERIALS | Competition Mapping

Peepal
20 YEARS OF TRUST

~150K	~8% of 2M	Gujarat cluster, Mumbai, NCR	~18.7K
Top Players HC	Subsector Share	High-Comp Cities	Avg HC/Company

Company	Mfg HC	Metro Cities	# Locations	Key Functions	Hiring
Reliance Industries	100K+ (chems)	Jamnagar, Dahej	10	Process Ops, Engineering	High
UPL	12K	Mumbai	7	Chemical Eng, Sales	Medium
Pidilite	10K	Mumbai	8	Production, Supply Chain	Medium
SRF	8K	Gurugram	10	Chemical Ops, Quality	Medium
Aarti Industries	6K	Vapi	3	Specialty Chem Ops	Medium
GFL Env	5K	Gujarat	3	Chemical Ops, Quality	Medium
PI Industries	4K	Himatnagar	4	Chem Eng, R&D	Medium
Tata Chemicals	4.6K	Mithapur	5	Process Ops	Low

KEY INSIGHTS:

- Gujarat hosts 50% of top chemical plants — critical ops hub
- Reliance dominates: 65% of top-10 headcount (100K+)
- Production/Chemical Engineering dominant functions
- Specialty chem skills show +30% gaps vs supply

FMCG & FOOD PROCESSING MFG | Competition Mapping

Peepal
20 YEARS OF TRUST

~95K (organized)	~1% of 8M (incl. informal)	Mumbai, NCR, Bengaluru, Kolkata + Tier-2	~11.9K
Top Players HC	Subsector Share	High-Comp Cities	Avg HC/Company

Company	Mfg HC	Metro Cities	# Locations	Key Functions	Hiring
ITC	20K	Kolkata, Pan-India	100+	Production, Supply Chain	High
Hindustan Unilever	15K	Mumbai, Pan-India	40+	Production, R&D	High
Nestle India	15K	Gurugram, Pan-India	8 plants	Production, Quality	High
Parle	12K	Mumbai, Pan-India	50	Production, Maintenance	Medium
Britannia	10K	Bengaluru, Pan-India	5	Production, Quality	Medium
PepsiCo India	10K	Gurugram, Pan-India	40	Production, Supply Chain	Medium
Dabur	8K	Ghaziabad, Pan-India	15	Production, Quality	Medium
Godrej Consumer	5K	Mumbai	10	Production, Engineering	Low

KEY INSIGHTS:

- 100+ locations (ITC) drive dispersed ops talent need
- Top 8 account for ~12% of organized subsector talent
- 5 major metros all represented — broadest geographic spread
- Production + Quality = dominant functions across all firms

PHARMA & LIFE SCIENCES MFG | Competition Mapping

~132K	~4% of 3M	Hyderabad, Ahmedabad, Mumbai, Bengaluru	~14.7K
Top Players HC	Subsector Share	High-Comp Cities	Avg HC/Company

Company	Mfg HC	Metro Cities	# Locations	Key Functions	Hiring
Sun Pharma	20K+	Mumbai, Hyderabad	40+	Production, R&D	High
Cipla	15K	Mumbai, Hyderabad	45	Production, Quality	High
Dr. Reddy's	15K	Hyderabad	20	R&D, Production	High
Aurobindo	15K	Hyderabad	25	Production, API Ops	High
Zydus Lifesciences	15K	Ahmedabad	20	Production, R&D	High
Lupin	12K	Pune, Mumbai	15	Production, Quality	Medium
Biocon	10K	Bengaluru	5	Biotech, R&D	High
Torrent Pharma	10K	Ahmedabad	10	Production, Quality	Medium
Intas	10K	Ahmedabad	15	Production, API Ops	Medium

KEY INSIGHTS:

- Ahmedabad/Hyderabad host 50% of top pharma mfg sites
- Top 10 = 132K — critical for API/formulation talent
- R&D+Production dominant; Biocon unique for biotech roles
- High comp premiums: 15-17% attrition; 25-40% R&D gaps

SECTION 03

TALENT ARCHITECTURE

Peepal
20 YEARS OF TRUST

CITY TALENT DISTRIBUTION

City	Headcount	% Share	Cluster Type	Key Roles	Key Employers	Intensity
Chennai	1M	20%	Manufacturing Hub	Production, Maintenance, Quality	Hyundai, Ashok Leyland	High
Pune	1.2M	24%	Manufacturing Hub	Engineering, Production, Supply Chain	Tata Motors, Bajaj, Mahindra	High
NCR	800K	16%	Mixed Cluster	Engineering, Sales	Maruti Suzuki, Hero	Medium
Mumbai	500K	10%	Supply Hub	Supply Chain, Sales	Tata, Mahindra	Medium
Tier-2 Cluster	1.5M	30%	Manufacturing Hub	Production, Maintenance	Jamshedpur, Sanand plants	High

TALENT GAP MATRIX

City	Role	Experience	Supply	Demand	Gap %	Gap Level
Chennai	Engineering/R&D	8–12 yrs	50K	80K	38%	**Critical**
Pune	Engineering	13–17 yrs	40K	70K	43%	**Critical**
Pune	Production Ops	0–2 yrs	200K	220K	9%	**Moderate**
NCR	Supply Chain	3–7 yrs	100K	110K	9%	**Moderate**
Tier-2	Maintenance	18+ yrs	50K	60K	17%	**High**

Peepal
20 YEARS OF TRUST

CITY TALENT DISTRIBUTION

City	Headcount	% Share	Cluster Type	Key Roles	Key Employers	Intensity
Bengaluru	600K	30%	R&D/Engineering Hub	VLSI Design, Embedded	Nvidia, Qualcomm, HCL	High
Chennai	500K	25%	Manufacturing Hub	Production, ATMP	Foxconn, Samsung	High
Noida	400K	20%	Mixed Cluster	Testing, Fab	Dixon, Micron	High
Hyderabad	200K	10%	R&D Hub	Chip Design	Qualcomm	High
Tier-2 Cluster	300K	15%	Manufacturing Hub	Semi-skilled Fab	Dholera, Mohali	Medium

TALENT GAP MATRIX

City	Role	Experience	Supply	Demand	Gap %	Gap Level
Bengaluru	VLSI Engineers	8–12 yrs	50K	100K	50%	**Critical**
Noida	Fab Technicians	3–7 yrs	30K	50K	40%	**Critical**
Tier-2	ATMP Workers	0–2 yrs	100K	150K	33%	**Critical**
Chennai	Production Ops	0–2 yrs	150K	160K	6%	**Moderate**

TALENT ARCHITECTURE – PHARMA & LIFE SCIENCES | City Distribution

CITY TALENT DISTRIBUTION

City	Headcount	% Share	Cluster Type	Key Roles	Key Employers	Intensity
Hyderabad	800K	27%	R&D Hub	Formulators, R&D Sci	Dr. Reddy's, Aurobindo	High
Ahmedabad	700K	23%	Manufacturing Hub	API Operations	Zydus, Intas, Torrent	High
Mumbai	500K	17%	Mixed	Quality, Supply Chain	Sun Pharma, Cipla	Medium
Tier-2 Cluster	1M	33%	Manufacturing Hub	Production	Lupin sites	Medium

TALENT GAP MATRIX

City	Role	Experience	Supply	Demand	Gap %	Gap Level
Hyderabad	R&D Scientists	8–12 yrs	100K	150K	33%	**Critical**
Ahmedabad	API Process Eng	3–7 yrs	80K	110K	27%	**High**
Mumbai	Validation Eng	3–7 yrs	60K	75K	20%	**High**

CAMPUS HIRING PIPELINE | Talent Architecture

~200K Annual Campus Hires	**15-20%** % from Campus	**+24%** YoY Growth	**40/30/30** Eng / Diploma / ITI Split

CAMPUS SOURCE MAPPING

Institute Tier	Examples	% Contribution	Roles Hired
Tier-1 (IITs/NITs)	IIT Madras, IIT Bombay, NIT Trichy	30%	Engineering/R&D
Tier-2 (NITs, VIT, SRM)	VIT, SRM, BITS Pilani	40%	Production Engineering
Tier-3 / ITIs	State ITIs, Polytechnics	30%	Ops / Diploma / Semi-skilled

SUB-INDUSTRY CAMPUS DEPENDENCE

Sub-Industry	% Hiring from Campus	Key Roles Hired	Employability Note
Automotive & EV	20%	Engineering, Operations	~51% grads job-ready (low)
Electronics & Semi	25%	VLSI, Embedded Eng	Low job-ready; 320K shortfall
Pharma & Life Sciences	18%	R&D, Validation Eng	Growing campus pipeline
FMCG & Food Processing	15%	Production, Quality	High fresher absorption
Industrial Machinery	18%	Mechanical Design	ITI/Diploma heavy
Chemicals & Specialty	15%	Chemical Eng, Process	Moderate absorb

Source: [1] Lapaas Campus Surge 2025 [2] IBEF/Deloitte 2025 [3] Taggd [4] LinkedIn Automotive 2025

SECTION 04

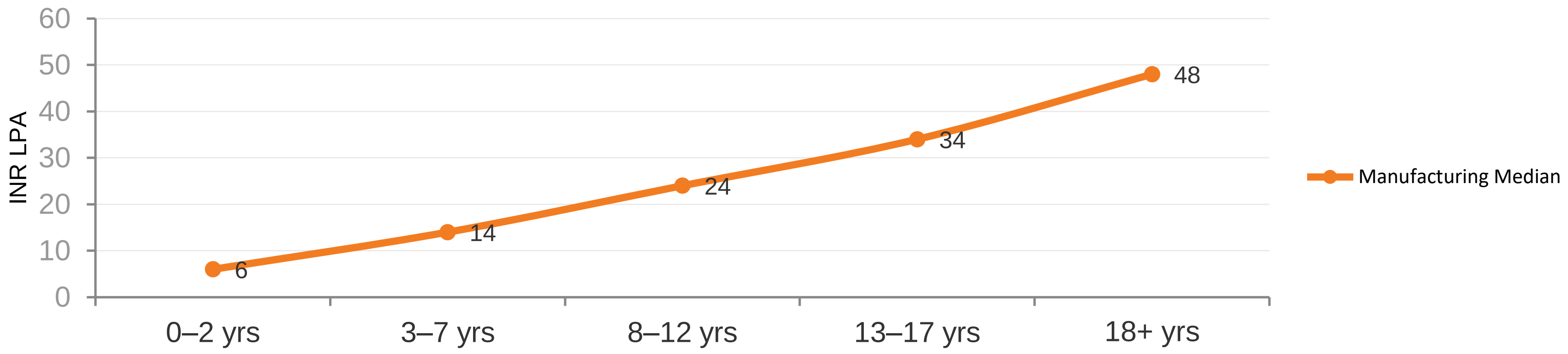
COMPENSATION ANALYSIS

COMPENSATION MATRIX – AUTOMOTIVE & EV | INR LPA

All figures in INR LPA (Lakhs Per Annum). Ranges reflect variable pay + market variance. NA = insufficient data.

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs	22+ yrs
EV Powertrain Engineer	7–7.35	16–17	26–28	35–37	45–47	55+
Plant Operations Manager	5–5.25	12–12.6	20–21	28–29.4	38–39.9	48+
Assembly Line Supervisor	4–4.2	8–8.4	14–14.7	*NA*	*NA*	*NA*
Quality Engineer	6–6.3	14–14.7	22–23	30–31.5	40+	*NA*

MEDIAN COMPENSATION TREND (ALL ROLES – MANUFACTURING)

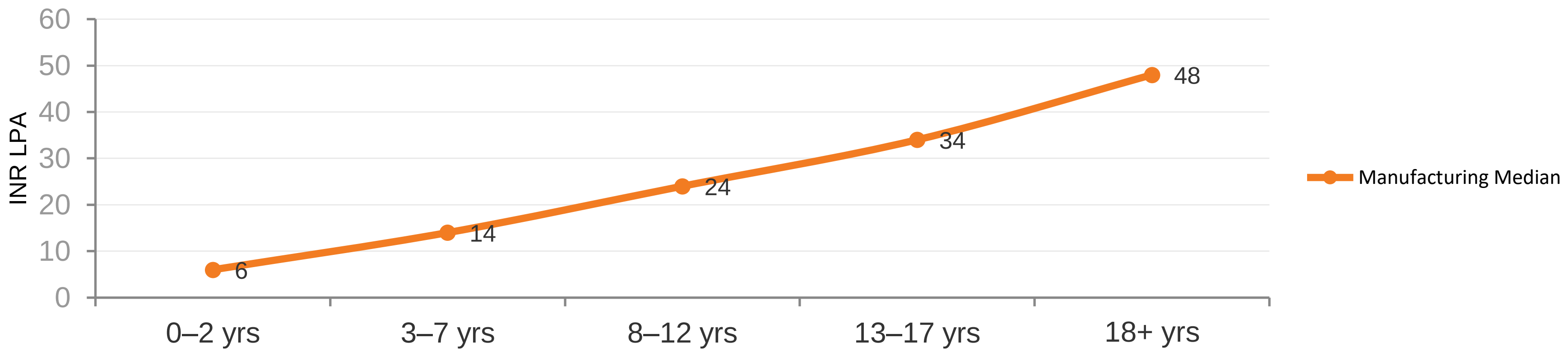


COMPENSATION MATRIX – ELECTRONICS & SEMICONDUCTOR | INR LPA

All figures in INR LPA (Lakhs Per Annum). Ranges reflect variable pay + market variance. NA = insufficient data.

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs	22+ yrs
VLSI Designer	8–8.4	20–21	35–37	50–52.5	65+	80+
ATMP Technician	5–5.25	10–10.5	16–16.8	24–25.2	*NA*	*NA*
Embedded Systems Eng	7.5–7.88	18–18.9	30–31.5	42–44.1	55+	*NA*

MEDIAN COMPENSATION TREND (ALL ROLES – MANUFACTURING)

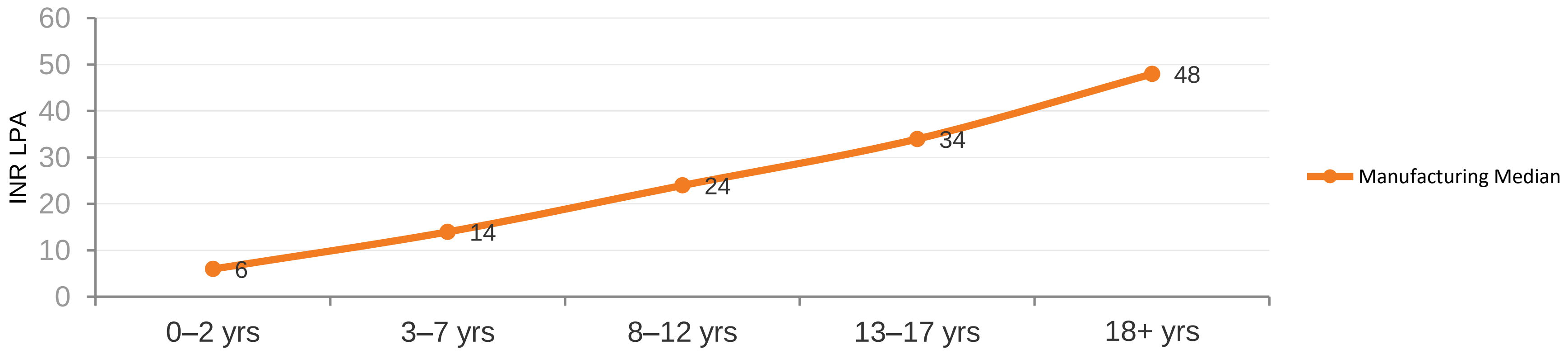


COMPENSATION MATRIX – INDUSTRIAL MACHINERY | INR LPA

All figures in INR LPA (Lakhs Per Annum). Ranges reflect variable pay + market variance. NA = insufficient data.

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs	22+ yrs
Mechanical Design Eng	6.5–6.83	14–14.7	24–25.2	32–33.6	42+	52+
CNC Machinist	4.5–4.73	9–9.45	15–15.75	*NA*	*NA*	*NA*
Plant Maintenance Mgr	5.5–5.78	12–12.6	20–21	28–29.4	38+	*NA*

MEDIAN COMPENSATION TREND (ALL ROLES – MANUFACTURING)

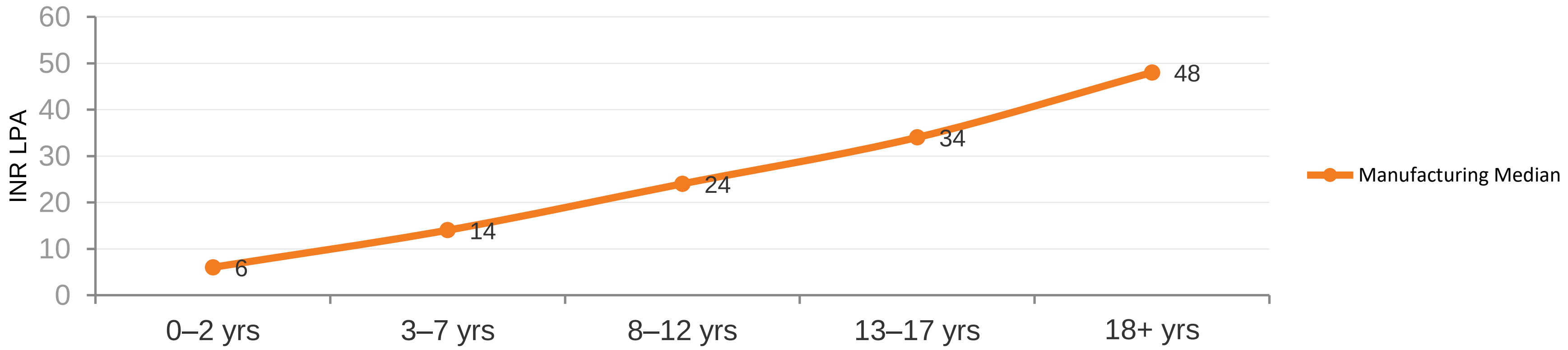


COMPENSATION MATRIX – CHEMICALS & SPECIALTY | INR LPA

All figures in INR LPA (Lakhs Per Annum). Ranges reflect variable pay + market variance. NA = insufficient data.

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs	22+ yrs
Process Chemist	6–6.3	13–13.65	22–23.1	30–31.5	40+	50+
Specialty Chem Engineer	7–7.35	15–15.75	25–26.25	35+	*NA*	*NA*

MEDIAN COMPENSATION TREND (ALL ROLES – MANUFACTURING)

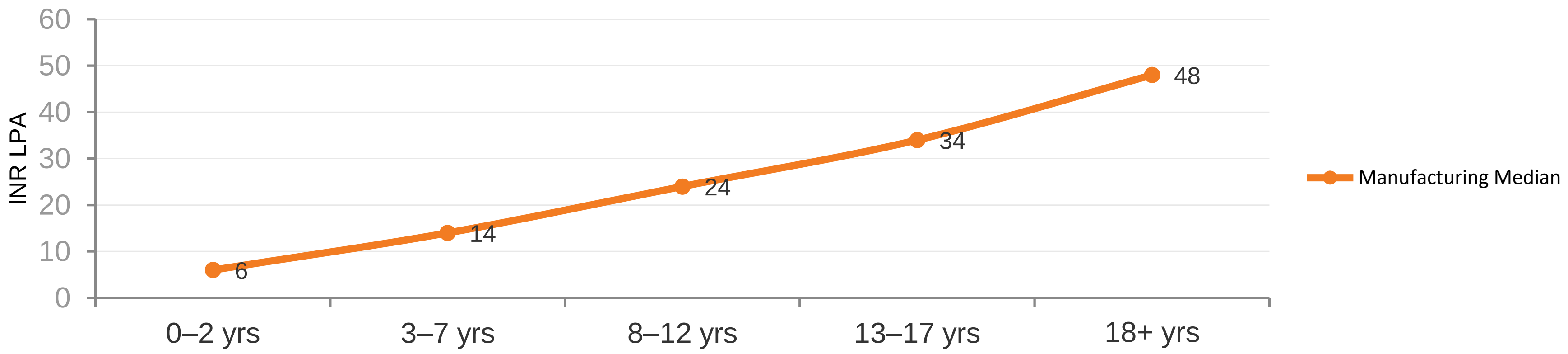


COMPENSATION MATRIX – FMCG & FOOD PROCESSING | INR LPA

All figures in INR LPA (Lakhs Per Annum). Ranges reflect variable pay + market variance. NA = insufficient data.

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs	22+ yrs
Production Supervisor	4.8–5.04	10–10.5	16–16.8	22–23.1	30+	*NA*
Supply Chain Planner	6–6.3	14–14.7	23–24.15	32+	*NA*	*NA*

MEDIAN COMPENSATION TREND (ALL ROLES – MANUFACTURING)

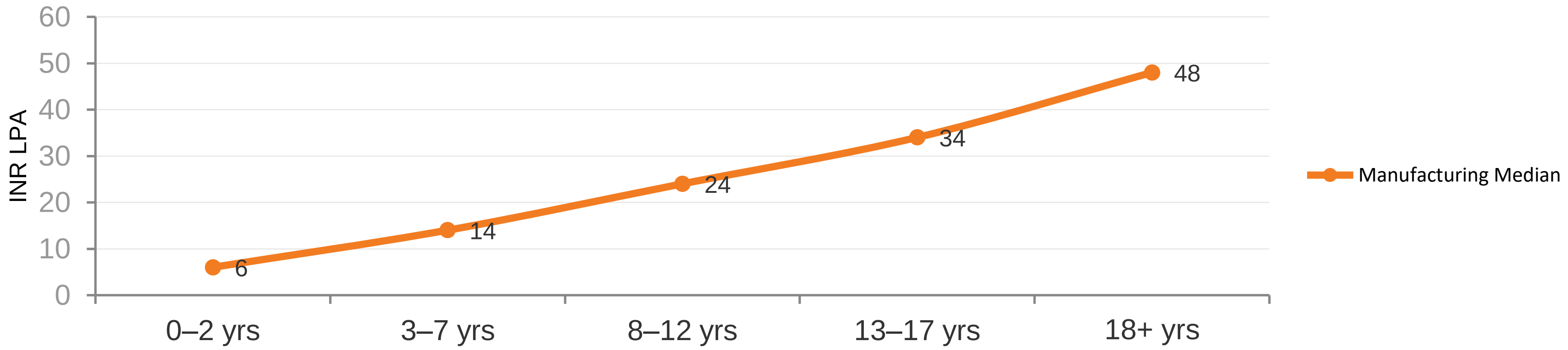


COMPENSATION MATRIX – PHARMA & LIFE SCIENCES | INR LPA

All figures in INR LPA (Lakhs Per Annum). Ranges reflect variable pay + market variance. NA = insufficient data.

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs	22+ yrs
Validation Engineer	7–7.35	16–16.8	28–29.4	38–39.9	50+	60+
Regulatory Affairs Mgr	*NA*	18–18.9	32–33.6	45+	*NA*	*NA*

MEDIAN COMPENSATION TREND (ALL ROLES – MANUFACTURING)



COMPENSATION PREMIUMS | Sub-Industry · City · Skill

SUB-INDUSTRY PREMIUM vs. MANUFACTURING AVERAGE (Baseline: ~₹21L)

Sub-Industry	Avg Premium (%)	Roles with Premium	Source
Automotive & EV	+9.5%	EV Engineer, Plant Manager	IBEF 2026 hike data
Electronics & Semi	+10–15%	VLSI Designer, Embedded Eng	Tech proxy + talent gap
Industrial Machinery	+9.9%	Mechanical Design Eng	Engineering design hike
Chemicals & Specialty	+5%	Process Chemist, Chem Eng	Automation skill premium
FMCG & Food Processing	Base (0%)	Production Supervisor	Nat. low end anchor
Pharma & Life Sciences	+8%	Validation Eng, Reg Affairs	BFSI/Pharma high sector

CITY COMPENSATION INDEX (India = 100)

City	Index vs India	Premium/Discount	Dominant Roles
Bengaluru	130–140	+30–40%	Engineering/R&D
Mumbai	130–140	+30–40%	Supply Chain, Sales
NCR	130–140	+30–40%	Mixed
Hyderabad	120–130	+20–30%	R&D, Pharma
Chennai	110–120	+10–20%	Production
Pune	110–120	+10–20%	Manufacturing
Tier-2 Cluster	82–90	−10–18%	Operations

SKILL PREMIUMS

Skill	Premium
EV Battery Systems	+25–30%
VLSI + AI/ML	+30–40%
PLC + IoT	+20–25%
GMP + Validation	+15–20%
Semiconductor Fab	+40%

SECTION 05

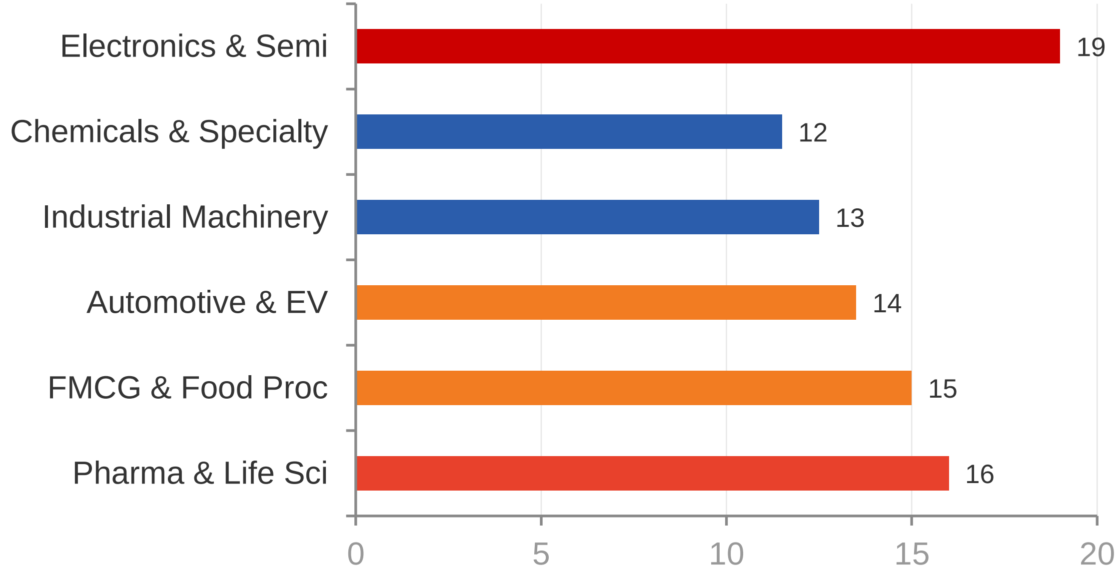
WORKFORCE BEHAVIOUR

OVERALL ATTRITION | Workforce Behaviour

Peepal
20 YEARS OF TRUST

12–14%	9–10.5%	3–3.5%	−10% YoY
Overall Attrition Rate	Voluntary Attrition	Involuntary Attrition	Change (16.2→13.6 proj.)

ATTRITION BY SUB-INDUSTRY



ATTRITION BY EXPERIENCE BAND

Experience	Attrition Rate
0–2 yrs	20–22%
3–7 yrs	16–18%
8–12 yrs	12–14%
13–17 yrs	10–12%
18–22 yrs	8–10%
22+ yrs	5–7%

ATTRITION & JOB SWITCH INTENT BY ROLE | Workforce Behaviour

Peepal
20 YEARS OF TRUST

Role	Attrition Rate (%)	% Actively Looking	% Open to Change	Primary Driver
Production / Operations	18–20%	20–25%	45–50%	Low wages, physical demands
Engineering / R&D	10–12%	15–20%	40–45%	Skill premium mobility
Quality	12–14%	12–15%	35–40%	Career advancement
Supply Chain	16–18%	18–22%	42–47%	Logistics sector competition
Maintenance	8–10%	8–12%	25–30%	Job security, stability
Sales (B2B)	14–16%	16–20%	38–43%	Variable incentives
Corporate Functions	15–17%	17–21%	40–45%	IT-sector comparison

JOB SWITCH INTENT BY CITY

City	% Actively Looking	% Open to Change
Bengaluru	22–27%	50–55%
Hyderabad	20–25%	45–50%
Mumbai	18–23%	42–47%
NCR	17–22%	40–45%
Pune	16–21%	40–45%
Chennai	15–20%	38–43%
Tier-2 Cluster	12–17%	30–35%

15–20% Actively Looking

40–45% Open to Change

35–45% Not Looking

HIGH-RISK TALENT SEGMENTS | Workforce Behaviour

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Segments where Attrition Rate > 1.5× industry average (13%) AND Job Switch Intent > 45%

Sub-Industry	Role	Experience	City	Attrition %	% Considering Change	Risk Level
Electronics & Semi	Production Ops	0–2 yrs	Bengaluru	25%	55%	CRITICAL
Pharma & Life Sciences	R&D Scientists	8–12 yrs	Hyderabad	20%	50%	HIGH
Automotive & EV	Engineering	3–7 yrs	Pune	18%	45%	HIGH
FMCG	Supply Chain	3–7 yrs	Tier-2	20%	47%	HIGH
Industrial Machinery	Maintenance	13+ yrs	Mumbai	8%	25%	MODERATE

CRITICAL INSIGHTS

CRITICAL	Electronics Bengaluru (0–2 yrs, Prod): 25% attrition + 55% intent — highest risk segment in manufacturing
HIGH	Production roles 18–20% vs industry avg 13% — 1.5× risk premium across all sub-industries
HIGH	Voluntary attrition = 75% of total; 40–45% workforce open to change signals structural retention issue
HIGH	Entry-level (0–2 yrs): 20–22% attrition — classic first-job churn compounded by PLI-driven hiring surge
LOW	Tier-2 lowest intent (12–17%) — stability advantage; key for ops-heavy roles in FMCG, Chemicals

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